

Processing Incurment Cases

Choose one of these three processes. Each process is outlined separately:

- Using bills for medical expenses to meet the incurment,
- Using cash option to meet the incurment, or
- Using a combination of bills and cash option.

Using Bills to Meet the Incurment:

Step	Action
1.	Access the INCU screen for the appropriate month. Verify that the correct INCU screen is displayed (if there are several Medicaid subtypes in the case).
2.	Enter the PERS NO (i.e., POA number of person who incurred the expense) for the first bill. <ul style="list-style-type: none"> • The person's participation code determines if his/her bills can be used to meet the incurment (per policy). If not allowed, TEAMS displays an error message.
3.	Tab to the MTH/DAY MED SVC field and enter the appropriate date: <ul style="list-style-type: none"> • For expenses incurred in the current month, enter the actual month and day of service. • For expenses incurred in a prior month, or for health insurance premiums, enter the current benefit month (the month you are working) and '00' as the day. • To enter a future date for a bill, see the policy manual (MA 1001-2) for guidelines.
4.	Tab to the PROVIDER NAME field. Enter the provider name or a description of the expense.
5.	Tab to the PROVIDER NUMBER field and enter the provider's actual Medicaid provider number, or a "dummy" number if necessary. <p>Dummy Provider Numbers are:</p> <p>1100002 Non-participating providers' bills</p> <p>1100008 Insurance premiums paid by the client</p> <p>1100021 Copayments used to meet the incurment</p> <p>1100019 Bills with a date-of-service prior to the Incurment Met Date.</p> <ul style="list-style-type: none"> • Dummy numbers cannot be entered for expenses incurred on or after the Incurment Met Date. For these expenses, accurate provider numbers must be entered to ensure Medicaid pays the correct provider. • If MTH/DAY MED SVC has a day of 00, the PROVIDER NUMBER can be blank.
6.	Tab to the DOCUMENT NUMBER field. Enter information to help identify the bill and prevent it from being used as an expense more than once.
7.	Tab to the AMOUNT OF BILL field and enter the dollar amount of the medical expense.

8.	Tab to the TPL COV AMOUNT field and enter the amount paid (or expected to be paid) by a third-party insurer, if applicable.
9.	<p>Repeat steps 2-8 for each medical expense. Press Enter.</p> <ul style="list-style-type: none"> • The Incurment to Date field totals all bills entered so far. • If the incurment is met, the message “INCURMENT MET WITH LINE X. \$XX.XX IS CLIENT RESPONSIBILITY” displays, and the bill that met the incurment is highlighted. The message “INCURMENT MET - PLEASE VERIFY PROVIDER NUMBER AND AUTHORIZE” also displays at the bottom of the screen. • If you need to enter more than 11 bills for this month, change the “More Entries” indicator to Y and press Enter. A fresh INCU screen will display. You can then use F8 and F7 to page forward and backward, and F6 to return to the first page.
10.	<p>Authorize Medicaid benefits for the month by typing your password in the BENEFIT AUTH field. Press Enter. TEAMS will display the message “RECORD HAS BEEN SUCCESSFULLY UPDATED.” Press Enter to move on to the next screen.</p> <ul style="list-style-type: none"> • If changes are later made to the case that affect the incurment amount, the system may deauthorize benefits. See “To update the INCU screen...” on pg. 4.

Using Cash Option to Meet the Incurment (without bills):

Step	Action
1.	Access the INCU screen for the appropriate month. Verify that the appropriate INCU screen is displayed (if there are several Medicaid subtypes in the case).
2.	<p>Change the Cash Option indicator to Y. Press Enter.</p> <ul style="list-style-type: none"> • This tells the system that the entire amount will be paid in cash by the participant.
3.	<p>Authorize the cash option by typing your password in the BENEFIT AUTH field. Press Enter.</p> <ul style="list-style-type: none"> • When Fiscal Bureau receives the cash payment from the participant, they will enter a batch number and authorize benefits on INCU.

Using a Combination of Bills and Cash Option to Meet the Incurment:

Step	Action
1.	Access the INCU screen for the appropriate month. Verify that the correct INCU screen is displayed (if there are several Medicaid subtypes in the case).
2.	<p>Enter the PERS NO. (i.e., POA number of person who incurred this expense) for the first bill.</p> <ul style="list-style-type: none"> • The person’s participation code determines if his/her bills can be used to meet the incurment (per policy). If not allowed, TEAMS displays an error message.

3.	<p>In the MTH/DAY MED SVC field, enter the current benefit month (the month being worked) and '00' for the day.</p> <ul style="list-style-type: none"> '00' must be used as the bill date for cash option cases. This ensures the Medicaid card has a start date of the 1st of the month when Fiscal has authorized the cash option.
4.	Tab to the PROVIDER NAME field. Enter the provider name or a description of the expense.
5.	<p>Tab to the PROVIDER NUMBER field and enter the provider's actual Medicaid provider number, or a "dummy" number if necessary.</p> <p>Dummy Provider Numbers are:</p> <ul style="list-style-type: none"> 1100002 Non-participating providers' bills 1100008 Insurance premiums paid by the client 1100021 Copayments used to meet the incurment 1100019 Bills with a date-of-service prior to the Incurment Met Date. <ul style="list-style-type: none"> Since all bills are entered with a day of '00' in this procedure, TEAMS allows the PROVIDER NUMBER field to be left blank if desired.
6.	Tab to the DOCUMENT NUMBER field and enter information to help identify the bill and prevent it from being used as an expense more than once.
7.	Tab to the AMOUNT OF BILL field to enter the dollar amount of the expense.
8.	Tab to the TPL COV AMOUNT field and enter the amount paid (or expected to be paid) by a third-party insurer, if applicable.
9.	<p>Repeat steps 2-8 for each medical expense. Press Enter.</p> <ul style="list-style-type: none"> The INCURMENT TO DATE field totals all the bills that were entered. If the incurment is met, the message "INCURMENT MET WITH LINE X. \$XX.XX IS CLIENT RESPONSIBILITY" displays, and the bill that met the incurment is highlighted. The message "INCURMENT MET - PLEASE VERIFY PROVIDER NUMBER AND AUTHORIZE" also displays at the bottom of the screen. If you need to enter more than 11 bills for this month, change the "More Entries" indicator to Y and press Enter. A fresh INCU screen will display. You can then use F8 and F7 to page forward and backward, and F6 to return to the first page.
10.	<p>After <u>all</u> bills have been entered, change the Cash Option indicator to Y. Press Enter.</p> <ul style="list-style-type: none"> This tells the system that the participant will pay the remainder of the incurment in cash. This amount displays in the AMT DUE field.
11.	<p>Type your password in the BENEFIT AUTH field to authorize the cash option. Press Enter.</p> <ul style="list-style-type: none"> When Fiscal Bureau receives the cash payment from the participant, they will enter a batch number and authorize benefits on INCU.

To update the INCU screen for cases using bills to meet the incurment:

Circumstance	Action
Incurment is <u>authorized but Medicaid card has not been issued</u> and a change must be made to income or household size	<p>The deauthorization screen displays when changes are made to case. Pass through EXBD/MABD to recalculate the incurment.</p> <ul style="list-style-type: none"> The BENEFIT AUTH field on INCU will now be blank; Reauthorize by entering your password.
Incurment must be re-authorized (e.g., new bill was entered after issuance, changing Incurment Met date)	<p>The BENEFIT AUTH field will be accessible so you can re-authorize and re-issue the MA card.</p> <ul style="list-style-type: none"> Reauthorize by entering your password.
<u>Medicaid card has already been issued</u> for the <u>full</u> month and a change is made to case	<p>If the incurment increases due to the change:</p> <ul style="list-style-type: none"> TEAMS displays the message “TM902549 BENEFIT ISSUED, INCURMENT INCREASE NOT ALLOWED.” The participant does not have to meet the higher incurment amount since benefits have already been issued. <p>If the incurment decreases due to the change:</p> <ul style="list-style-type: none"> TEAMS displays the message “TM902548 [\$000.00] AVAILABLE FOR FUTURE INCURMENT CARRY OVER.” TEAMS does not automatically carry this amount over to the next month; this must be done manually. <p>Note: In both of these situations, INCU continues to display the <u>original</u> incurment amount with which the MA eligibility date was determined. However, MABD/EXBD displays the re-worked incurment amount. Enter a Case Note to explain why the incurment amounts on INCU and MABD/EXBD do not match.</p>

To update the INCU screen for Cash Option cases:

Circumstance	Action
Cash Option has been <u>authorized by the Eligibility worker (but not yet by Fiscal)</u> and a change must be made to income or household size	<p>The deauthorization screen displays when changes are made to case. Pass through EXBD/MABD to recalculate the incurment.</p> <ul style="list-style-type: none"> The BENEFIT AUTH field on INCU is now blank, and the CASH OPTION indicator is automatically changed to ‘N.’ Message “TM902624 OUT OF BALANCE; PRESS ENTER TO RECALCULATE INCURMENT” appears. Press Enter!
Cash Option has been <u>authorized by the Eligibility worker AND by Fiscal Bureau</u>	<p>Only certain Fiscal workers can deauthorize the cash option, and only on the same day it was authorized.</p> <ul style="list-style-type: none"> Note: Fiscal has authorized benefits if a CS number appears in the FISCAL AUTH field on INCU.